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11/23/2003
 ~ 103

[Forecast Series Participants](#)

Last Name	First Name	Previous	Next
Phillips	Ethan		
Rogers	Rick		
Taylor	Ryan		
Waller	Lisa		
Williams	Joan		

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FIG. 1

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<div> <div>Step 1</div> <div>Step 2</div> <div>Step 3</div> </div>	
<div> <div>Select your Forecast Snapshot Frequency</div> <div>Create Forecast Snapshot Each * Week ~202</div> <div>* = Required Field</div> <div> Next Cancel </div> </div>	
<div> <div> Home Calendar Leads Accounts Contacts Opportunities Forecasts Reports Solutions Service Campaigns Dashboard Deleted Items </div> <div> © 2003 Siebel Systems, Inc. All Rights Reserved CRM OnDemand Terms of Use Privacy Statement </div> </div>	
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FIG. 2

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https://odl.siebel.com/OnDemand/User/ForecastAdmin

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Step 1

Step 2

Step 3

Select your Forecast Snapshot Auto Forecast Date

Forecast Snapshot Day* Sunday 302

* = Required Field

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Previous Next Cancel

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FIG. 3

FIG. 4

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To view a forecast, select the appropriate Forecast Date. Automated forecasts must first be defined and scheduled by your administrator before they will be viewable.

Forecast Homepage

All <u>0</u> <u>1</u> <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> <u>7</u> <u>8</u> <u>9</u> <u>A</u> <u>B</u> <u>C</u> <u>D</u> <u>E</u> <u>F</u> <u>G</u> <u>H</u> <u>I</u> <u>J</u> <u>K</u> <u>L</u> <u>M</u> <u>N</u> <u>O</u> <u>P</u> <u>Q</u> <u>R</u> <u>S</u> <u>T</u> <u>U</u> <u>V</u> <u>W</u> <u>X</u> <u>Y</u> <u>Z</u>										Previous	Next
Status	Forecast Date	Pipeline	Forecast	Closed Revenue	Owner					Previous	Next
Active	9/21/2003	\$55,050,000.00	\$43,950,000.00	\$7,800,000.00	Ethan Phillips	502				Previous	Next
Active	9/21/2003	\$55,050,000.00	\$43,950,000.00	\$7,800,000.00	Joan Williams						
Active	9/21/2003	\$35,450,000.00	\$27,550,000.00	\$1,400,000.00	Ryan Taylor						
Active	9/21/2003	\$10,400,000.00	\$7,200,000.00	\$3,200,000.00	Rick Rogers						
Active	9/21/2003	\$0.00	\$0.00	\$0.00	Lisa Waller						
Active	10/12/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Ethan Phillips	503				Previous	Next
Active	10/12/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Joan Williams						
Active	10/12/2003	\$2,800,000.00	\$2,800,000.00	\$0.00	Ryan Taylor						
Active	10/12/2003	\$5,250,000.00	\$4,200,000.00	\$0.00	Rick Rogers						
Active	10/12/2003	\$0.00	\$0.00	\$0.00	Lisa Waller						
Active	10/19/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Ethan Phillips	501				Previous	Next
Active	10/19/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Joan Williams						
Active	10/19/2003	\$2,800,000.00	\$2,800,000.00	\$0.00	Ryan Taylor						
Active	10/19/2003	\$5,250,000.00	\$4,200,000.00	\$0.00	Rick Rogers						
Active	10/19/2003	\$0.00	\$0.00	\$0.00	Lisa Waller						
Active	10/26/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Ethan Phillips					Previous	Next
Active	10/26/2003	\$12,600,000.00	\$10,850,000.00	\$0.00	Joan Williams						
Active	10/26/2003	\$2,800,000.00	\$2,800,000.00	\$0.00	Ryan Taylor						
Active	10/26/2003	\$5,250,000.00	\$4,200,000.00	\$0.00	Rick Rogers						
Active	10/26/2003	\$0.00	\$0.00	\$0.00	Lisa Waller						
Active	11/2/2003	\$13,150,000.00	\$11,400,000.00	\$0.00	Ethan Phillips					Previous	Next
Active	11/2/2003	\$13,150,000.00	\$11,400,000.00	\$0.00	Joan Williams						
Active	11/2/2003	\$3,000,000.00	\$3,000,000.00	\$0.00	Ryan Taylor						
Active	11/2/2003	\$5,600,000.00	\$4,550,000.00	\$0.00	Rick Rogers						
Active	11/2/2003	\$0.00	\$0.00	\$0.00	Lisa Waller						

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To view a forecast, select the appropriate Forecast Date. Automated forecasts must first be defined and scheduled by your administrator before they will be viewable.

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Status	Forecast Date	Pipeline	Forecast	Closed Revenue	Owner					Previous	Next
Active	9/21/2003	\$55,050,000.00	\$43,950,000.00	\$7,800,000.00	Ethan Phillips	502				Previous	Next
Active	9/21/2003	\$55,050,000.00	\$43,950,000.00	\$7,800,000.00	Joan Williams						
Active	9/21/2003	\$35,450,000.00	\$27,550,000.00	\$1,400,000.00	Ryan Taylor						
Active	9/21/2003	\$10,400,000.00	\$7,200,000.00	\$3,200,000.00	Rick Rogers						
Active	9/21/2003	\$0.00	\$0.00	\$0.00	Lisa Waller						
Active	10/12/2003	\$12,600,000.00	\$10,								

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Created for: [Joan Williams](#) Create Date: 9/21/2003 Status: Active

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[Forecast Summary](#) [\[Edit\]](#) [Rollup](#) [Submit Forecast](#) [Unsubmit Forecast](#)

Date	Quota	Closed Revenue	Quota%	Forecast	Best Care	Pipeline	Expected Revenue
7/1/2003		\$3,450,000.00	0%	\$25,200,000.00	\$0.00	\$33,100,000.00	\$11,975,017.30
8/1/2003		\$2,350,000.00	0%	\$5,950,000.00	\$0.00	\$5,950,000.00	\$4,869,997.65
9/1/2003		\$2,000,000.00	0%	\$12,800,000.00	\$0.00	\$16,000,000.00	\$9,470,000.00
Totals	\$0.00	\$7,800,000.00		\$43,950,000.00	\$0.00	\$55,050,000.00	\$26,315,014.95

[Term's Summary by Month](#)

Owner Alias	Date	Quota%	Forecast	Closed Revenue	Best Care	Pipeline	Last Updated
RR ROGERS	7/1/2003	0%	\$1,600,000.00	\$1,200,000.00	\$0.00	\$1,600,000.00	9/21/2003 11:23:38 PM
RR ROGERS	8/1/2003	0%	\$2,400,000.00	\$800,000.00	\$0.00	\$2,400,000.00	9/21/2003 11:23:38 PM
RR ROGERS	9/1/2003	0%	\$3,200,000.00	\$1,200,000.00	\$0.00	\$6,400,000.00	9/21/2003 11:23:38 PM
RT TAYLOR	7/1/2003	0%	\$21,600,000.00	\$1,050,000.00	\$0.00	\$29,500,000.00	9/21/2003 11:23:37 PM
RT TAYLOR	8/1/2003	0%	\$350,000.00	\$350,000.00	\$0.00	\$350,000.00	9/21/2003 11:23:37 PM
Totals			\$34,750,000.00	\$4,600,000.00	\$0.00	\$45,850,000.00	

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Close Date	Forecasted	Opportunity Name	Account Name	Revenue	Sales Stage	Next Step	Previous
Refresh 9/3/2003	Y	Boy Construction - Sid Order - 5 Phoenix 900	Boy Construction	\$400,000.00	6 - Closed/Won	Call	
Refresh 9/3/2003	Y	Boy Demolition Services - Sid Order - 5 Phoenix 900	Boy Demolition Services	\$400,000.00	7 - Closed/Lost	E-mail	
Refresh 9/30/2003	Y	Bobcat Loaders & Excavators - Sid Order - 5 Phoenix 900	Bobcat Loaders & Excavators	\$400,000.00	3 - Short List	None	
Refresh 8/18/2003	Y	Carter's Rigging & Supply - Sid Order - 5 Phoenix 900	Carter's Rigging & Supply	\$400,000.00	6 - Closed/Won	None	

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FIG. 6

SEARCH CRM OnDemand Search		Home <input type="checkbox"/> Calendar <input type="checkbox"/> Leads <input type="checkbox"/> Accounts <input type="checkbox"/> Contacts <input type="checkbox"/> Opportunities <input type="checkbox"/> Forecasts <input type="checkbox"/> Reports <input type="checkbox"/> Solutions <input type="checkbox"/> Service		CustomerCare Training Admin MySetup Deleted Items Help Sign Out	
---	--	--	--	---	--

Forecast Edit		Help Tutorial Back	
Forecast Summary	Save	Cancel	Refresh Totals
Forecast Date	Closed Revenue	Forecast	Best Case
7/1/2003	\$3,450,000.00	\$25,200,000.00	\$0.00
8/1/2003	\$2,350,000.00	\$5,950,000.00	\$0.00
9/1/2003	\$2,000,000.00	\$12,800,000.00	\$0.00
Totals	\$7,800,000.00	\$43,950,000.00	\$0.00
			\$55,050,000.00
			\$26,315,014.95

Contacts <input type="text"/> Advanced Search <input type="text"/> Submit	Create Task Appointment Contact Opportunity Account Lead Service Request Solution
--	---

FIG. 7

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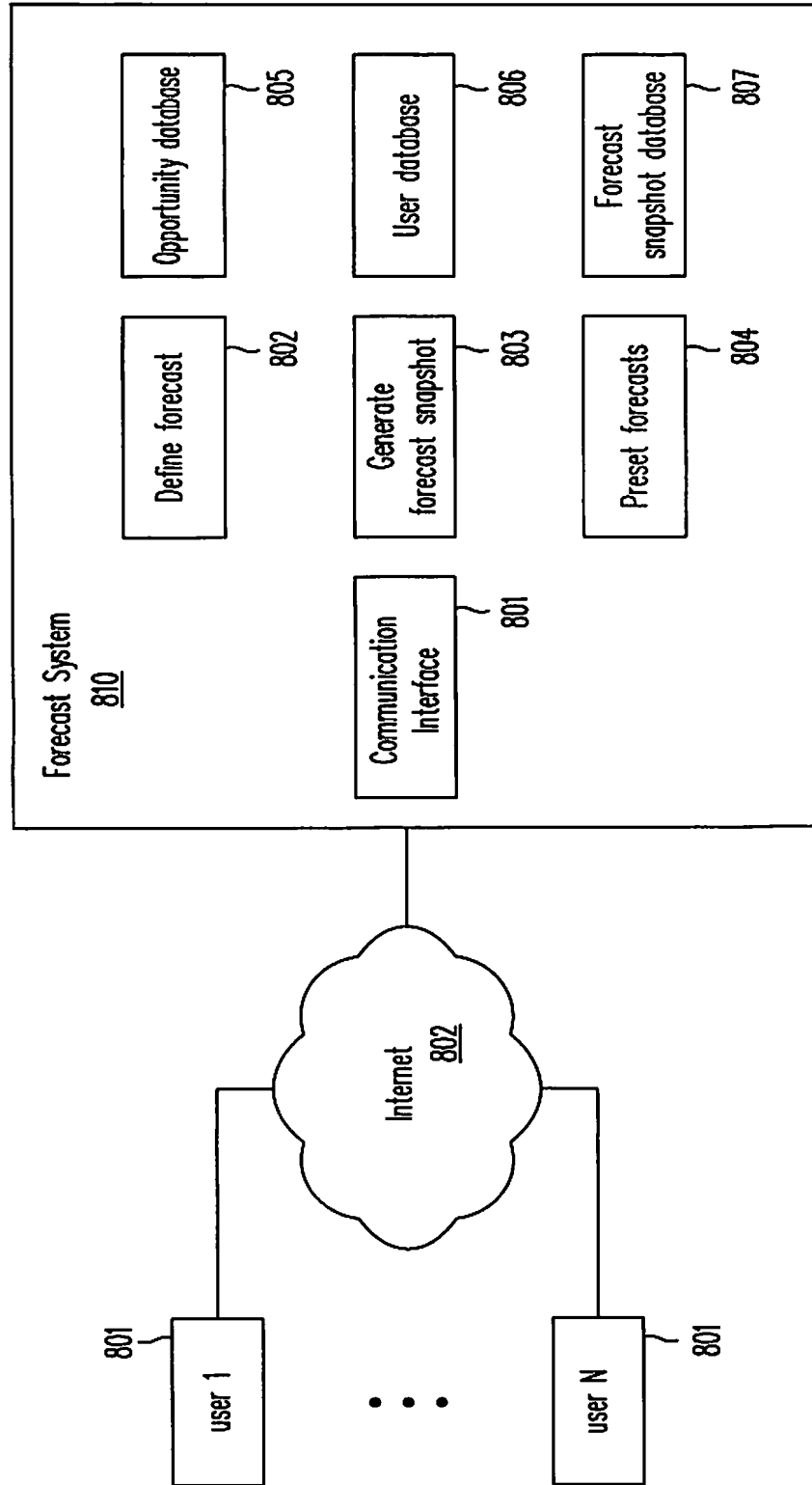


FIG. 8

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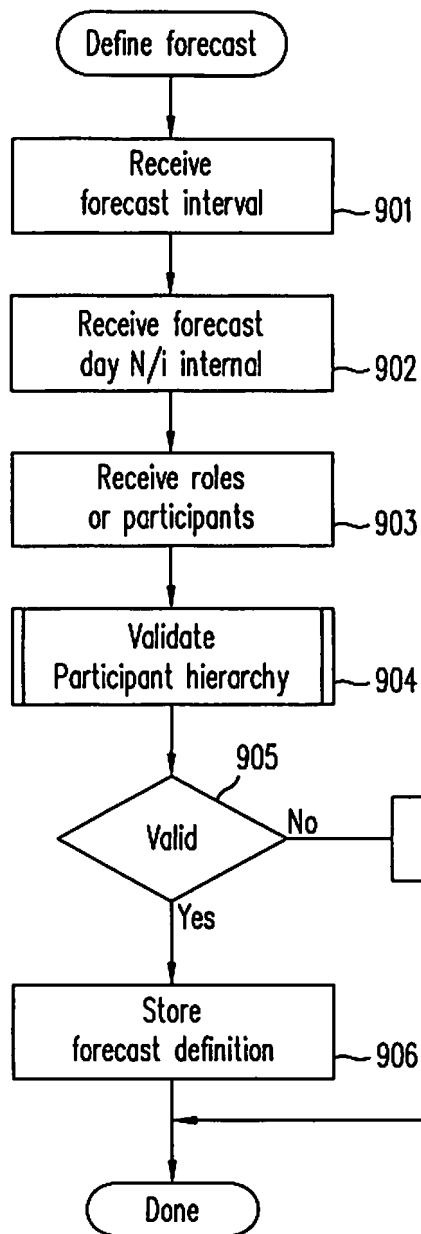


FIG. 9

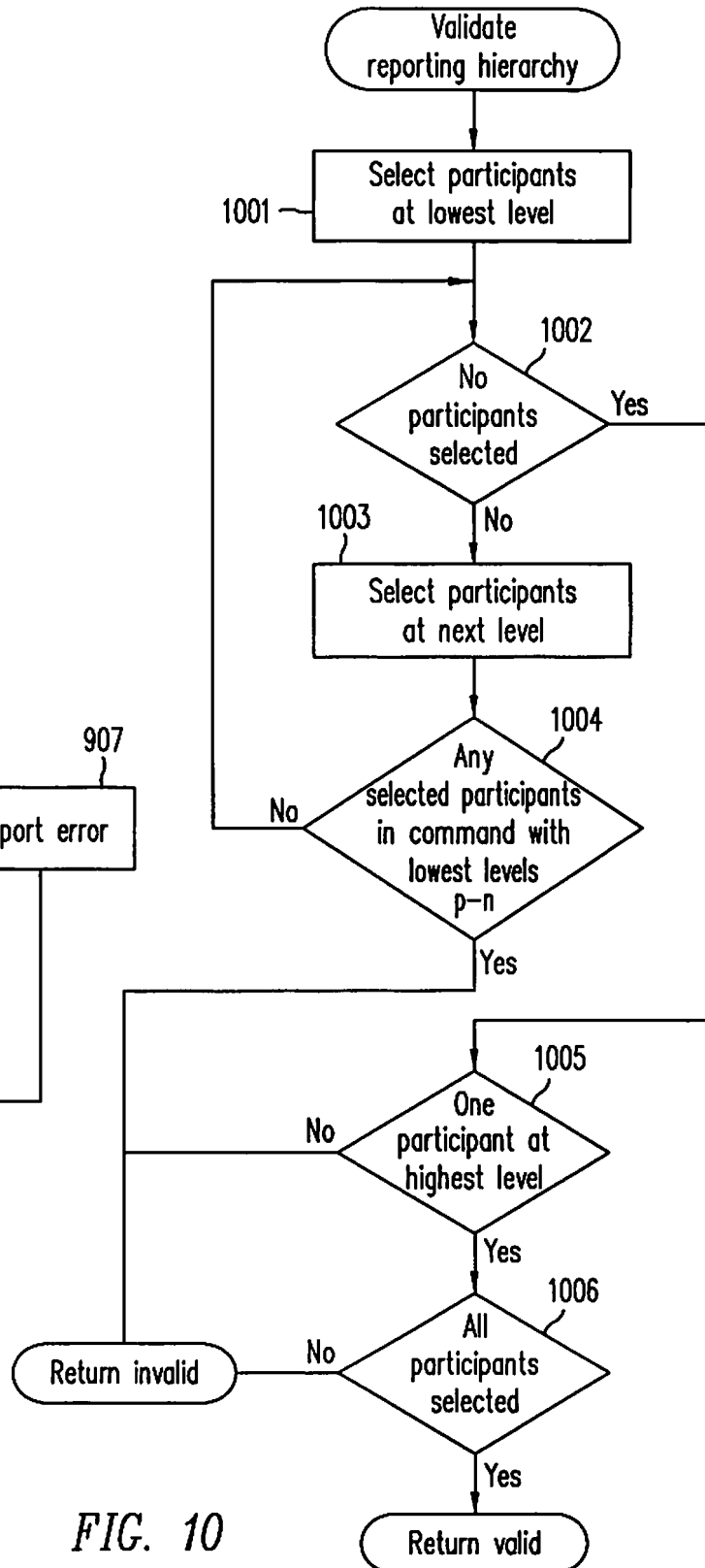


FIG. 10

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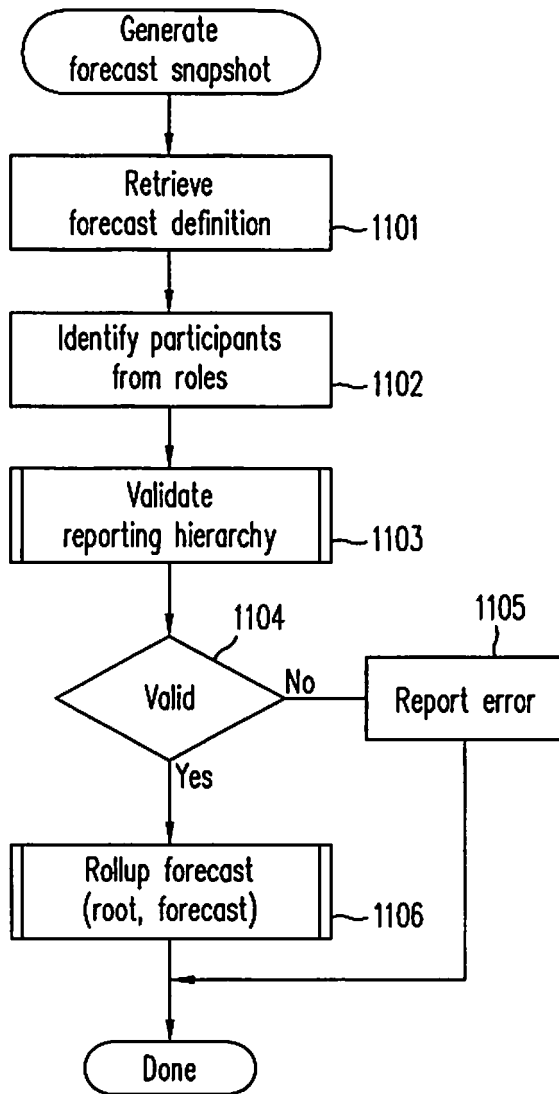


FIG. 11

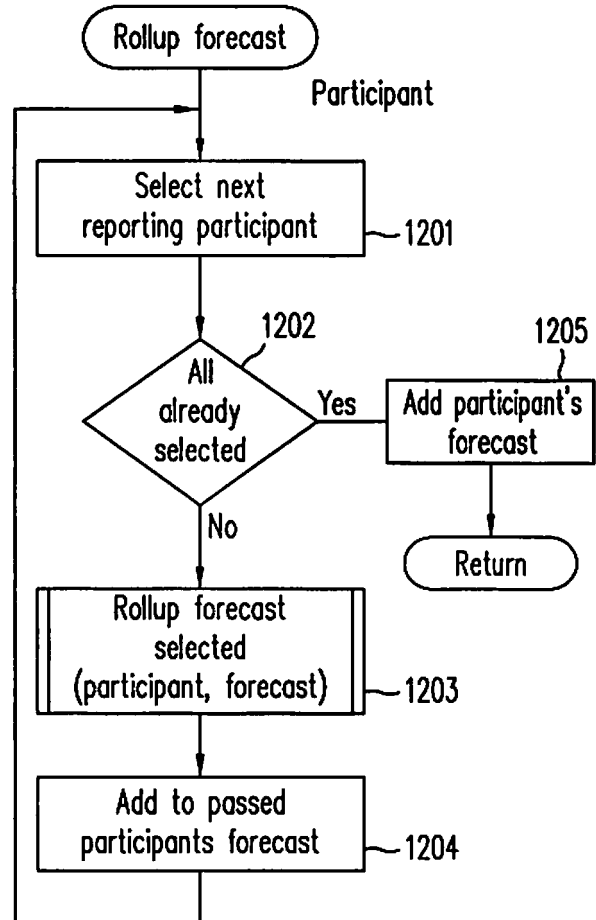


FIG. 12

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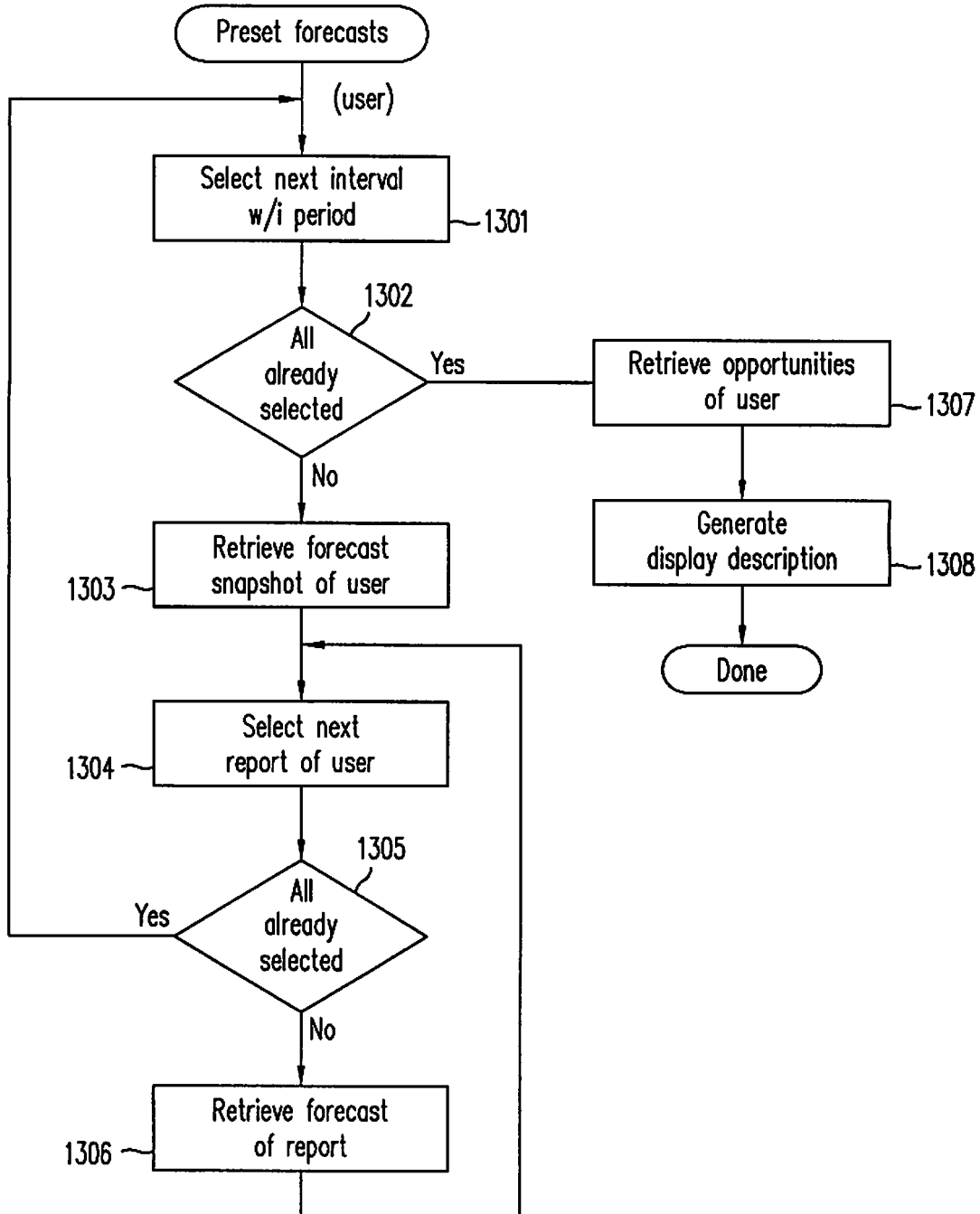


FIG. 13